OptiM2M Portal

Administration Module User Manual

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All pertinent state, regional, and local safety regulations must be observed when installing and using this product. For reasons of safety and to help ensure compliance with documented system data, only the manufacturer should perform repairs to components.

When devices are used for applications with technical safety requirements, the relevant instructions must be followed.

Failure to use Schneider Electric software or approved software with our hardware products may result in injury, harm, or improper operating results.

Failure to observe this information can result in injury or equipment damage.

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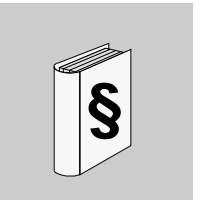
Safety Information



Important Information

NOTICE

Read these instructions carefully, and look at the equipment to become familiar with the device before trying to install, operate, or maintain it. The following special messages may appear throughout this documentation or on the equipment to warn of potential hazards or to call attention to information that clarifies or simplifies a procedure.

The addition of this symbol to a Danger safety label indicates that an electrical hazard exists, which will result in personal injury if the instructions are not followed.

This is the safety alert symbol. It is used to alert you to potential personal injury hazards. Obey all safety messages that follow this symbol to avoid possible injury or death.

⚠ DANGER

DANGER indicates an imminently hazardous situation which, if not avoided, **will result in** death or serious injury.

⚠ WARNING

WARNING indicates a potentially hazardous situation which, if not avoided, **can result in** death or serious injury.

⚠ CAUTION

CAUTION indicates a potentially hazardous situation which, if not avoided, **can result in** minor or moderate injury.

NOTICE

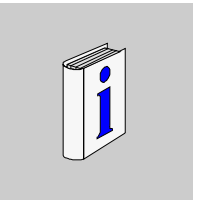
NOTICE is used to address practices not related to physical injury.

PLEASE NOTE

Electrical equipment should be installed, operated, serviced, and maintained only by qualified personnel. No responsibility is assumed by Schneider Electric for any consequences arising out of the use of this material.

A qualified person is one who has skills and knowledge related to the construction and operation of electrical equipment and its installation, and has received safety training to recognize and avoid the hazards involved.

About the Book



At a Glance

Document Scope

This manual describes how to program and operate your OptiM2M Portal.

NOTE: Read and understand this document before installing, operating, or maintaining your OptiM2M Portal.

Validity Note

This document has been updated with the release of OptiM2M V1.1.

Related Documents

Title of Documentation	Reference Number
OptiM2M Portal - Configuration Module - User Manual	EIO0000000874 (Eng)
OptiM2M Portal - Operations Module -Device Management - User Manual	EIO0000000875 (Eng)
SR2MOD04 - GPRS Modem - Hardware Manual	EIO0000000873 (Eng)
SR2MOD04 - GPRS Modem - Instruction Guide	S1A84873

You can download these technical publications and other technical information from our website at www.schneider-electric.com.

Product Related Information

⚠ WARNING

UNINTENDED EQUIPMENT OPERATION

- Only use software approved by Schneider Electric for use with this equipment.
- Update your application program every time you change the physical hardware configuration.

Failure to follow these instructions can result in death, serious injury, or equipment damage.

⚠ WARNING

LOSS OF CONTROL

- Consider the potential failure modes of control paths and, for certain critical control functions by the designer of any control scheme, provide a means to achieve a safe state during and after a path failure. Examples of critical control functions are emergency stop and overtravel stop, power outage, and restart.
- Provide separate or redundant control paths for critical control functions.
- Include system control paths communication links. Give consideration to the implications of unanticipated transmission delays or failures of the link.
- Observe all accident prevention regulations and local safety guidelines.[1]
- Test individually and thoroughly each implementation of this equipment for proper operation before being placed into service.

Failure to follow these instructions can result in death, serious injury, or equipment damage.

[1] For additional information, refer to NEMA ICS 1.1 (latest edition), "Safety Guidelines for the Application, Installation, and Maintenance of Solid-State Control" and to NEMA ICS 7.1 (latest edition), "Safety Standards for Construction and Guide for Selection, Installation and Operation of Adjustable-Speed Drive Systems" or their equivalent governing your particular location.

User Comments

We welcome your comments about this document. You can reach us by e-mail at techcomm@schneider-electric.com.

Logging

1

Login to the OptiM2M Portal

Compatible Software Versions

The OptiM2M Portal is accessed through standard Internet connections.

Before starting, check that all appropriate components of software are installed in your IT environment.

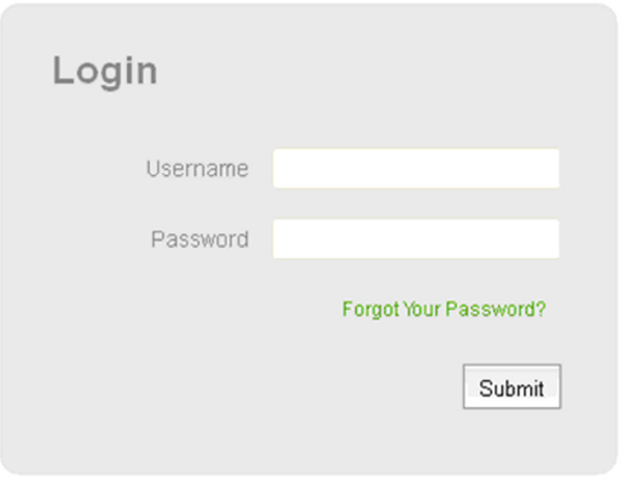
The OptiM2M Portal is accessed using the following browsers:

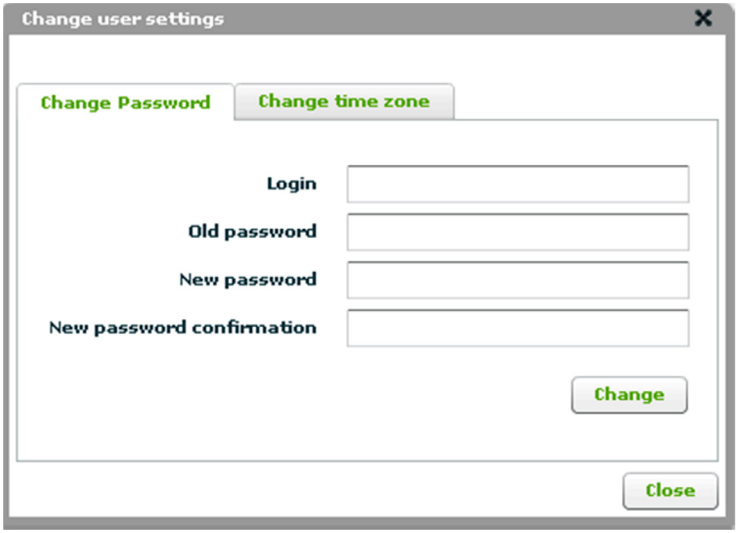
Operating system	Web browser
Windows	Internet Explorer: IE8, Firefox: 3.6+
Macintosh - OS X	Firefox: 3.6+
Linux	Firefox: 3.6+

Some graphical displays also require Flash Player (version 10 or later) to be installed. Update your current Flash Player before trying to access the OptiM2M Portal.

Login Procedure

This procedure explains how to log in to the OptiM2M Portal:

Step	Action
1	Open a certified web browser.
2	Enter the following URL: `https://optim2m-schneider-electric.m2mop.net/` The portal **Login** page displays: 
3	In the **Username** field, enter your username.
4	In the **Password** field, enter your user password. **NOTE:** The password is case-sensitive.

Step	Action
5	Click **Submit**. On first connection, a **Change user settings** window opens, asking you to change the initial password created for you by the Schneider Electric team: 
6	Enter all required information in the **Change Password** tab: **Old password**, **New password**.
7	Confirm the password in the **New password confirmation** field.
8	If needed, change the time zone settings in the **Change time zone** tab.
9	Click **Change**. A pop-up message displays indicating that the password, and if applicable, time zone settings have been successfully changed. **NOTE:** These settings are also changed from the OptiM2M Portal dashboard by clicking the **Change user settings** button in the **User Settings** zone of the portal.
10	Click **OK**.
11	In the **Change user settings** window, click **Close**. The OptiM2M Portal opens on the portal dashboard.

For reasons of security regarding your installation, change the default password immediately upon first login.

⚠ WARNING

UNAUTHORIZED DATA ACCESS

- Immediately change the default password to a new, secure password.
- Do not distribute the password to unauthorized or otherwise unqualified personnel.
- Disable the portal to prevent any unwanted or unauthorized access to data in your application.

Failure to follow these instructions can result in death, serious injury, or equipment damage.

NOTE: A secure password is one that has not been shared or distributed to any unauthorized personnel and does not contain any personal or otherwise obvious information. Further, a mix of upper and lower case letters, numbers, and special characters offer the greatest security possible. Choose a password length of at least 7 characters.

Administering Companies

2

Overview

This chapter describes the **Companies** tab of the OptiM2M Portal administration module.

It introduces the functionality of companies in the context of the OptiM2M Portal, describes the graphical elements of the tab interface, and provides you with illustrated step-by-step procedures for managing (creating, editing, deleting) companies.

What Is in This Chapter?

This chapter contains the following topics:

Topic	Page
Companies Functionality	14
Companies Tab Interface	17
Managing Companies	19

Companies Functionality

Overview

The following content describes the functionality of companies in the context of the OptiM2M Portal. It also lists parameters required when setting up a company.

Functionality Overview

The **COMPAGNIES**' tab of the OptiM2M Portal allows you to break down your organization in to one or several parent and child companies. When creating your user account, the Schneider Electric team always associates your account with a parent company. This parent company then serves as a basis for creating child companies and structuring your organization in levels as a tree structure.

NOTE: Only users with an administrative rights profile can create parent companies.

Child companies inherit a number of settings (for example, SMS provider) from their parent companies. Some other settings common to parent and child companies (for example, emails) take on different values between a child company and its associated parent company.

The structure of your company is displayed as a tree structure in the left pane of the **COMPAGNIES** tab. This details the companies, their profiles, and advanced settings displayed in the main pane.

Company Parameters

Company parameters are divided in to four main families:

- **Details**
- **Profiles**
- **Invoicing**
- **Advanced**

All of these parameters are set in the **Company Creation** window when creating a company *(see page 19)* or directly in the main pane, configured as a **Company Edition** pane when editing an existing company *(see page 23)*.

The following contents describe each of the parameter families.

Company Details

The table describes all mandatory and optional company details parameters:

Parameter	Mandatory	Description
Company Name	Yes	Name of the company as displayed in the left pane and other areas of the GUI (drop-down menus, etc.). Two companies with the same level and the same parent company do not have the same name.
Parent Company	No	Applies only to child companies. Name of the parent company of the company.
External Id	No	Identifier of the company in other systems. Enables the mapping between the company in the OptiM2M Portal and the same company as identified in other systems.
Email 1 to Email 5	No	Email addresses for notifying users of alerts. These emails are used when no group manager is defined for all the groups containing the device. **NOTE:** The unit alerts are directly sent to these email addresses.
Address	No	Company address. Not used by the portal.
Portal CSS URL	No	Customer-specific CSS file for customizing the Flash content of the OptiM2M Portal. This URL is inherited from the child companies. This field must be empty.
Login CSS URL	No	Customer-specific CSS file for customizing the HTML content of the OptiM2M Portal. This URL is inherited from the child companies. This field must be empty.

Company Profiles

The table describes all mandatory and optional profile parameters:

Parameter	Mandatory	Description
Profile	Yes	Company profile.
Child Companies Profiles	Yes	Profiles available for child companies of the company being currently set. These profiles are made available as company profile parameters when creating a child company.
User Profiles	Yes	User profiles available for all users of the company being currently set. These profiles are made available as user profile parameters when creating user for the company *(see page 30)*.

NOTE: Profile parameters apply only to child companies. The parent root company created via account creation does not have any such parameters.

Company Advanced

The table describes all optional advanced parameters:

Parameter	Mandatory	Description
Description	No	Company description.
JDE CustomerId	No	Is inactive. For internal use only.
SMS Provider	No	When set, all SMS sent either to devices (for commanding them) or to users (for notification) are sent through the selected SMS provider. If left not set, no SMS is sent. **NOTE:** SMS providers are also set at device level. For example to take advantage of price advantages depending on where the device is geographically installed.
Disclaimer	No	Disclaimer displayed on first login of a user. Users are forced to accept it or not depending on whether the corresponding checkbox (Force users to accept this new disclaimer) is checked or not. When the checkbox is checked, it is saved in the database. This disclaimer is used for all the sub companies. The disclaimer is in HTML.
"Contact us" email	No	Default email address is used when clicking the contact US web link (located at the bottom of the interface).
Corporate logo URL	No	URL of the company logo inserts in the lower left corner of the OptiM2M Portal.
RSA Authentication	No	Is inactive. For internal use only.

Companies Tab Interface

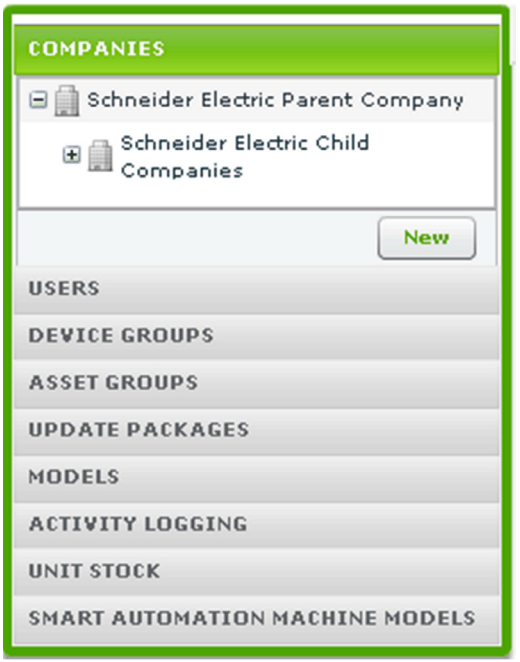
Overview

The following content describes the following graphical elements of the companies:

- **COMPANIES** tab left pane
- **Company Edition** main pane

Companies Tab Left Pane

When clicked, the **COMPANIES** tab opens on your tree structure companies:



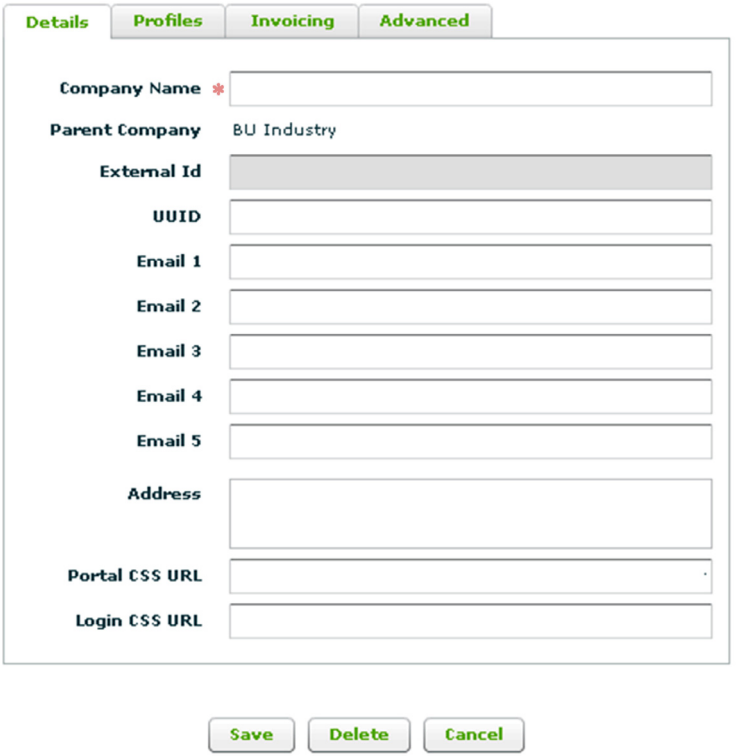
NOTE: Users associated with a given company are given access to this and its child companies.

To create company, click **New**.

Companies Main Pane

When a company is selected in the left pane of the **COMPANIES** tab, the main pane displays a **Company Edition** pane including all information related to the selected company. Company information is divided in to four tabs, each corresponding to a parameters group:

- Details *(see page 15)*
- Profiles *(see page 15)*
- Invoicing *(see page 78)*
- Advanced *(see page 16)*



NOTE: No **Profiles** information displays for parent companies. Only child profile information for companies is populated.

Refer to the table for the list of command buttons:

Button	Description
Save	Saves the current setting as a setting of the selected company
Cancel	Cancels all changes of the settings performed since the last save
Delete	Deletes the selected company

Managing Companies

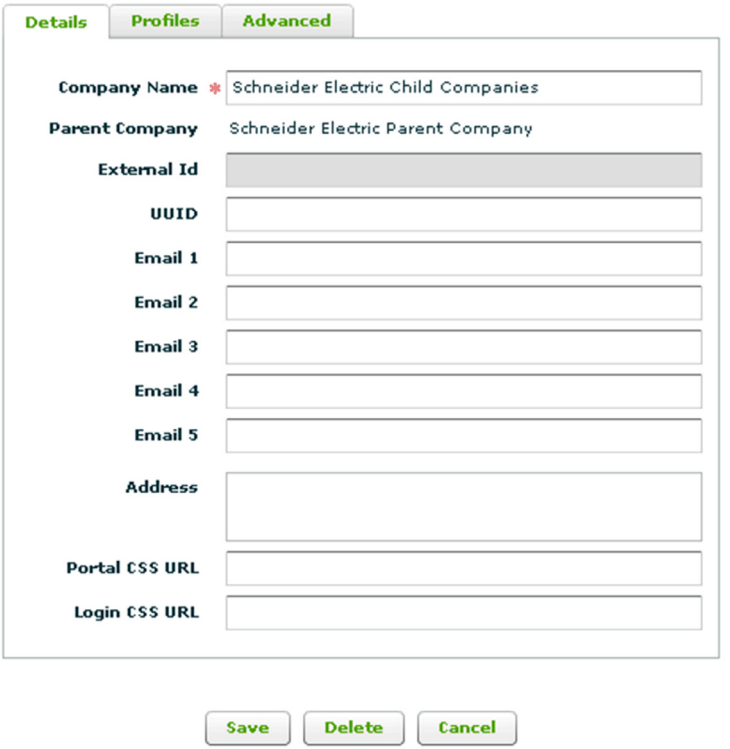
Overview

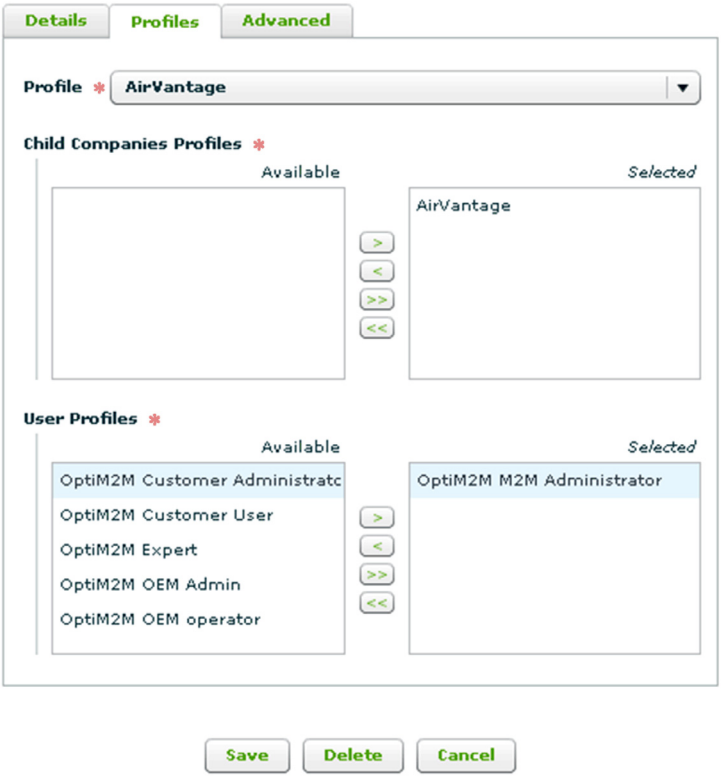
The following content describes how to create a company, how to edit, and delete existing companies.

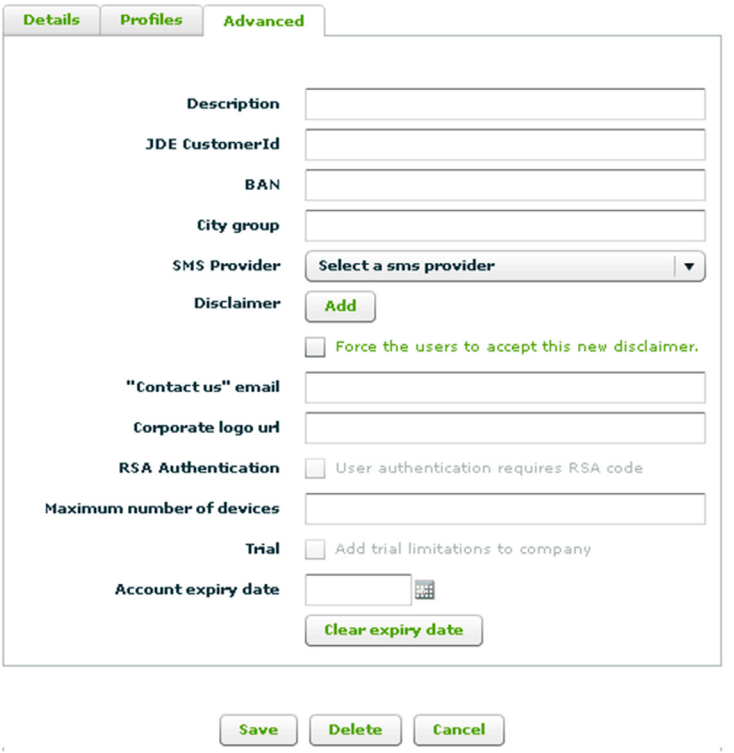
NOTE: Only users with the appropriate profile and rights create, edit, or delete a company.

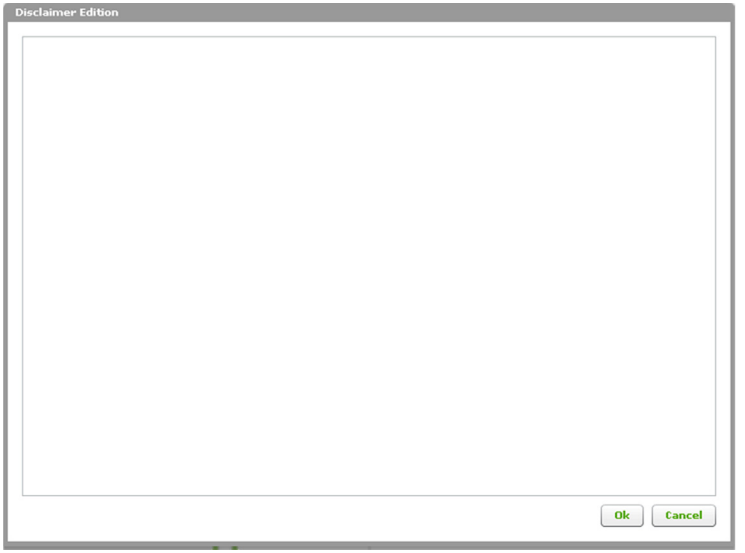
Creating a Company

The following procedure describes how to create company.

Step	Action
1	In the **Company Creation** tab, select the parent company.
2	Click **New**. The following window displays:  The **Parent Company** field is already populated with the name of the company selected before opening the window.

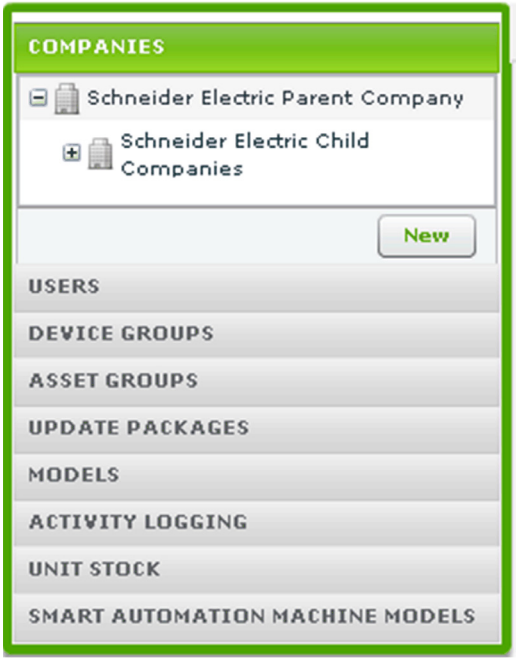
Step	Action
3	Enter the company name in the **Company Name** field. **NOTE:** Only this parameter is mandatory in this parameters group. All other parameters are optional.
4	Enter a company identifier in the **External Id** field if you require mapping your company name with the name of the company in other systems.
5	Enter as many email addresses as required in **Email 1** to **Email 5** fields. Emails are used as notification email addresses when a device triggers an event, an asset, or a subscriber. These emails are used when: ● the device/asset triggering the event belongs to a device/asset group associated with this company ● no group manager is defined for this device/asset group.
6	Enter the company address in the **Address** field, if necessary.
7	Select the **Profiles** tab. The window is re-configured:  **NOTE:** Set all of the profile parameters.

Step	Action
8	Select a profile in the **Profiles** drop-down menu. Select the company profile available. This field is not used but mandatory.
9	In the **Child Companies Profiles** windows, specify which company profiles are inherited by child companies. Select **AirVantage** profile in the **Available** window, and then click **>** to transfer it to the **Selected** window. Companies created as a parent company (**Parent Company** parameter) inherit only these profiles.
10	Using the **User Profiles** windows, specify which user profiles are available for users associated with this company. Available user profiles depend on the company profile. To do so, select the required profiles in the list, and then click **>** to transfer it to the **Selected** list. **NOTE:** Group your selection by keeping the Shift key pressed while selecting the required profiles, and then click **>**.
11	Select the **Advanced** tab. The window is re-configured:  All of the information contained in the **Advanced** tab is optional.
12	Describe your company in the **Description** tab.

Step	Action
13	Select the SMS provider **HSL_SMCS** in the **SMS Provider** drop-down menu. **NOTE:** If no SMS provider is selected in the **SMS Provider** drop-down menu, no SMS are sent to devices.
14	Click **Add** next to **Disclaimer** to create a disclaimer. The following window displays:  This disclaimer is displayed on the first connection of all users associated with the company selected.
15	Edit the disclaimer.
16	Click **OK**.
17	Enter an email address in the **"Contact us" email** field to change the default email address of the "Contact us" link.
18	Enter a URL in the **Corporate logo URL** field to insert a logo in the lower left corner of the OptiM2M Operating Portal.
19	Click **Create**. The newly created child company displays in the **Companies** tab as a child of the defined parent company. **NOTE:** When a company is created, device groups and asset groups with the same name are automatically created. They display in the **Device Groups** and **Asset Groups** accordion tabs of the administration module.

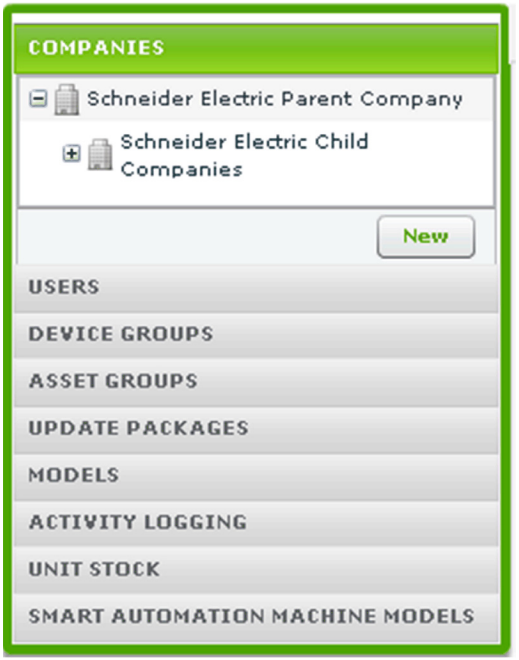
Editing a Company

Once a company has been created, you edit its parameters directly in the **Company Edition** pane displayed when selecting the company edits in the **Companies** tab left pane.

Step	Action
1	Select the company edits in the left pane:  The main pane is re-configured as a **Company Edition** pane allowing you to access all company-related information.
2	Edit all required parameters in the **Company Detail**, **Profiles**, or **Advanced** tabs of the pane.
3	Click **Save** in the **Company Edition** button bar of the pane. The company is saved with new settings. **NOTE:** Click **Cancel** to cancel all changes applied to existing parameters or all new settings entered since the last save.

Deleting a Company

If necessary, a company is directly deleted using the **Delete** button of the **Company Edition** pane after it has been selected in the **Companies** tab left pane.

Step	Action
1	Select the company to delete in the left pane:  The main pane is re-configured as a **Company Edition** pane.
2	Click **Delete** in the **Company Edition** command button of the pane. The company is deleted. **NOTE:** Before deleting a company, check that it does not contain any users, device, or assets groups. You do not remove a company which contains or has users or groups linked to it.

Administering Users

3

What Is in This Chapter?

This chapter contains the following topics:

Topic	Page
Creating a User Profile	26
Users Tab Interface	28
Managing Users	30

Creating a User Profile

Overview

In the OptiM2M Portal, users have to create a user profile which is associated with a company. The user selects the profiles when creating a company *(see page 19)*. The user profile dictates depending on user rights, which actions are performed on companies, devices, assets, etc. The first user account created is always associated with a company profile with administrator rights which allows to create users at the first connection to the OptiM2M Portal. Users are displayed as a table in the main pane when selecting the **Users** tab.

NOTE: Company and profile also serve as search criteria when searching for a user *(see page 34)* from the left pane of the **Users** tab.

User Parameters

Users are defined through a given set of mandatory and optional user parameters. These parameters are set either in the **User Creation** or **User Edition** window when creating a user *(see page 30)* or editing an existing one *(see page 32)*. These user parameters are presented in the following tables.

The table describes all mandatory user parameters:

Parameter	Description
Login	User name as defined in the **Username** field of the login page. This **Login** is unique.
Password	User password, as defined in the **Password** field of the login page **NOTE:** • If forgotten, email retrieves the password, depending on the **Email** parameter set for the user. • The password is changed on first connection.
Email	User email address. This parameter is required to recover forgotten passwords and to receive alerts by email.
Phone Number	User phone number, in international format: +CC PN, where CC is the country code and PN the phone number. This parameter is used to receive alerts by SMS.
Company	Name of the company the user is associated with.
Profile	User profile. Available profiles depend on the company **User Profiles** parameter which is set when creating a company.
Time Zone	Time zone of the workplace a user is operating from. This parameter is used to display the date and time of the time zone of the user.

The table describes all optional user parameters:

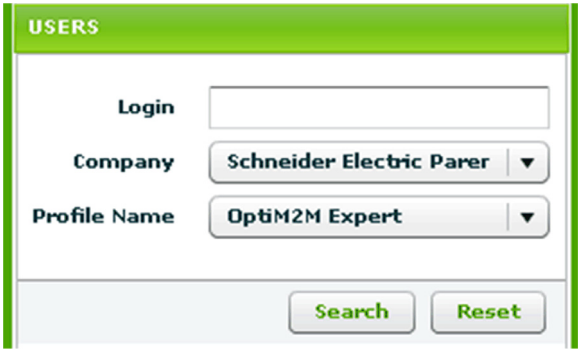
Parameter	Description
First Name	First name of the user.
Last Name	Last name of the user.
Code	Allow to display a customer identification number. **NOTE:** This code is not used in the portal.
Description	User description (position, location, etc.).
Language	Preferred language of the user for the OptiM2M Portal. **NOTE:** Available languages are French and English. The default language depends on your OS and web browser language settings.
Device Group and Asset Group	Allows the user to be a group manager and modify these groups if necessary. **NOTE:** If left not set, the user is not a group manager and cannot receive the associated alerts.

Users Tab Interface

Users Tab Left Pane

Click the **USERS** tab to open the search window.

The figure shows the **USERS** search window:



This form allows the user to search for another user based on three criteria:

- **Login** name
- **Company** name
- **Profile Name**

The user selects one or several criteria to search for another user. Click **Search** to start the search *(see page 34)* or click **Reset** to clear the fields.

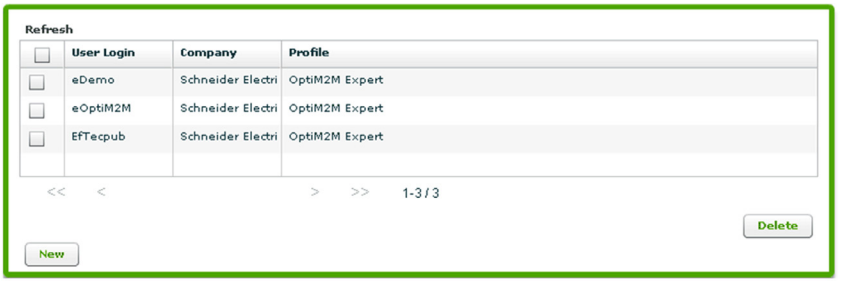
Users Main Pane

When the **USERS** tab is selected, the **User Administration** pane is displayed in the main pane.

The table describes the information of the main pane:

Column Name	Description
Login	User login as set when creating the user (login parameter).
Company	User company name as set when creating the user (**Company** parameter).
Profile Name	User profile as set when creating the user (**Profile** parameter).

The figure shows a view of the **User Administration** pane:



NOTE: Displayed users depend on the profile rights of the logged in user. A **User Edition** window is opened by clicking a row.

The table describes the command buttons available in the **User Administration** pane:

Button	Description
Refresh	Refreshes the display.
New	Opens the **User Creation** window to create user.
Delete	Deletes the selected user.

User Settings Section

The **User** log in (as well as first and last names if set) and **Time zone** of the logged in user are displayed in a **User Settings** section on the upper-right of the user interface.

The figure shows a view of the **User Settings** section:

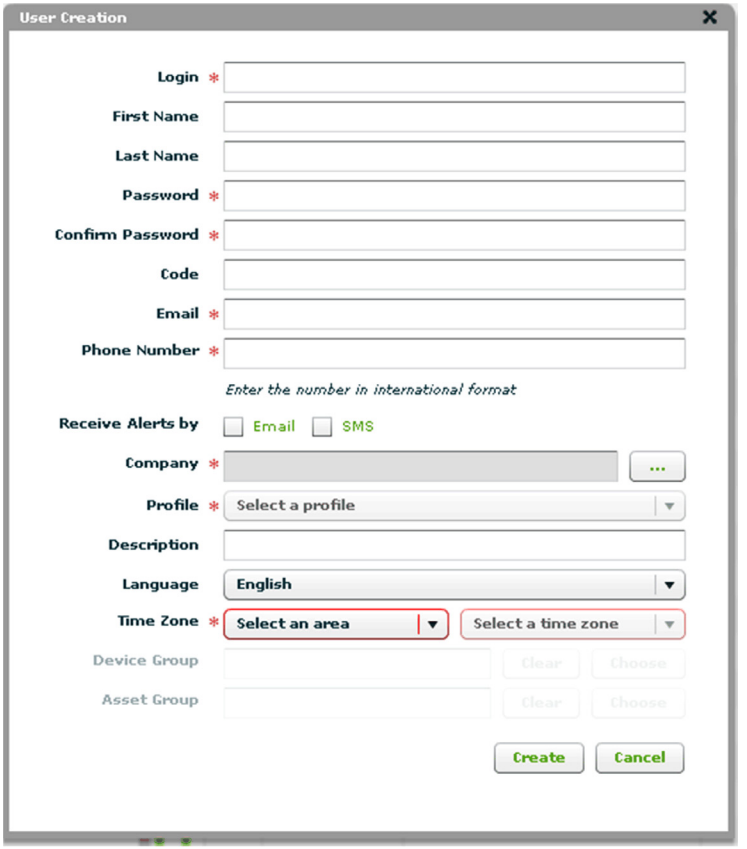
The table describes the two links included in the **User Settings** section:

Link	Description
Change user settings	Opens the **Change user settings** window which allows the user to: ● change a user password ● change a user time zone For more information, see how to change user settings *(see page 32)*.
Logout	Logs off the user and automatically redirects to the login page.

Managing Users

Creating a User

The following procedure describes how to create a user:

Step	Action
1	In the left pane, click the **USERS** tab. In the **User Administration** pane, click **New**. The figure shows the **User Creation** window: 
2	In the **Login** field, type the username.
3	In the **First Name** and the **Last Name** fields, type a first name and a last name. If set, this information displays in the **User** field of the **User Settings** section *(see page 29)*.

Step	Action
4	In the **Password** and the **Confirm Password** fields, type the mandatory user password. **NOTE:** Change the password initially set for a user on first connection *(see OptiM2M Portal, Operation Module - Device Management, User Manual)*.
5	In the **Code** field, type a code if necessary. **NOTE:** The portal does not use the codes. It allows only the user to specify a customer identification number.
6	In the **Email** field, type an email address.
7	In the **Phone Number** field, type a phone number in international format. **Result:** A **Number in international format** displays the **Phone Number** field. **NOTE:** The email and phone number details are used for notifying (by email or SMS) the user of events triggered by devices/assets belonging to the device/asset groups specified for the user, as well as for retrieving forgotten passwords.
8	Select the **Email** and/or **SMS** check boxes if you require to send notifications to the user by email and/or SMS.
9	In the **Company** list, select a company name. **Result:** The **Device Group** field and **Asset Group** field become active. **NOTE:** These fields allow you to limit the user access to specific device and asset groups of the selected company. Select a device and/or asset group or leave blank to allow a user to access any of the device and asset groups of the selected company.
10	In the **Profile** list, select a profile name. **NOTE:** Only profiles associated with the company as user profiles *(see page 19)* are available.
11	In the **Description** field, add information about the user if necessary.
12	In the **Language** list, choose a language (English or French).
13	In the **Time Zone** lists, select an area and a time zone.
14	Click **Create**. **Result:** The new user is now created. It displays in the table of the **User Administration** tab.

Editing a User

If necessary, a user is directly edited by clicking its name in the **User Administration** table.

The following procedure describes how to edit a user:

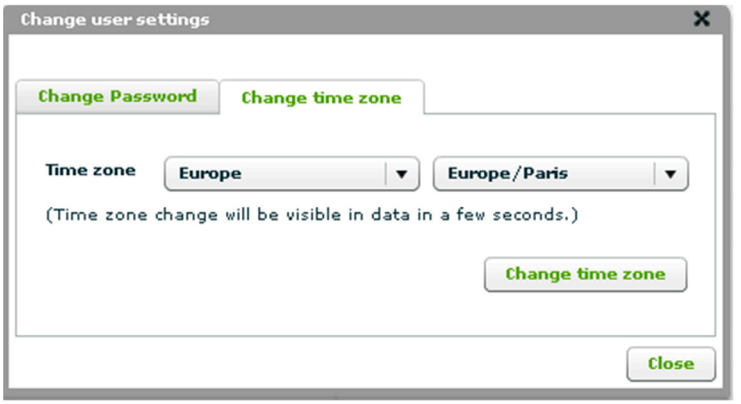
Step	Action
1	In the **User Administration** table *(see page 28)*, click the user name you want to edit. **Result:** A **User Edition** window (similar to the **User Creation** window *(see page 30)*) including all user information opens.
2	Change all required parameters.
3	Click **Update**. **Result:** The user is updated.

Changing a User Settings

If necessary, user settings of a logged in user are directly changed using the **Change user settings** link of the **User Settings** section *(see page 29)*.

The following procedure describes how to change user settings:

Step	Action
1	In the **User Settings** section, click **Change user settings**. **Result:** The **Change user settings** window displays. The **Change user settings** window allows you to change a user password and time zone.
2	To change a user password, in the **Old password** field, type the old user password.
3	In the **New password** and **New password confirmation** fields, type the new password.
4	Click **Change**. **Result:** A confirmation message displays: **Password successfully changed**.
5	Click **OK**.

Step	Action
6	To change a user time zone, click the **Change time zone** tab. 
7	In the **Time zone** lists, select a new area and time zone.
8	Click **Change time zone**. **Result:** A confirmation message displays: **Time zone successfully changed**.
9	In the **Change user settings** window, click **Close**. **Result:** The user settings are now changed.

Deleting a User

If necessary, a selected user is directly deleted using the **Delete** button of the **User Administration** pane.

The following procedure describes how to delete a user:

Step	Action
1	In the **User Administration** table *(see page 28)*, select the user to delete.
2	Click **Delete**. **Result:** A confirmation window displays: **Are you sure you want to delete this item?**
3	Click **Yes**. **Result:** The user is deleted.

Searching for a User

If necessary, from the **USERS** tab you search directly for a specific user using the search form and **Search** button.

The following procedure describes how to search for a user:

Step	Action
1	To login the **Company** and **Profile Name** fields, type the information required. **NOTE:** Not all search criteria will be required. If you do not type any criterion, all users are displayed.
2	To start the search, click **Search**. **Result:** The search results are displayed in the **User Administration** table. **NOTE:** If you want to clear the search criteria fields, click **Reset**.

Administering Device Groups

4

Overview

The **DEVICE GROUPS** tab allows you to manage your device groups by creating device groups and deleting or editing existing ones. It introduces the concept of device groups in the context of the OptiM2M Portal, describes the graphical elements of the tab interface, and provides you with illustrated step-by-step procedures for managing (creating, editing, deleting) device groups.

What Is in This Chapter?

This chapter contains the following topics:

Topic	Page
Device Group Concept	36
DEVICE GROUPS Tab Interface	37
Managing Device Groups	39

Device Group Concept

Overview

The following content describes the concept of device groups in the context of the OptiM2M Portal. It also lists parameters needed when setting up a device group.

In the OptiM2M Portal, a device group is always associated with a company. It allows the organization of the device to function in several groups in the same manner as you organize your files in directories.

If the user is allowed to manage the group, the user manages each device group.

DEVICE GROUPS Tab Interface

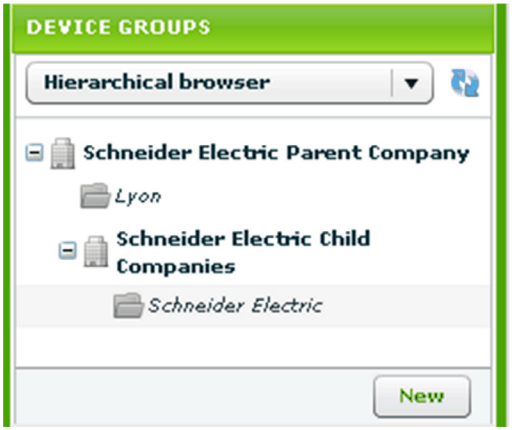
Overview

The following content describes the graphical elements of the device group:

- **DEVICE GROUPS** tab left pane
- **Device Group Edition** main pane

Device Group Tab Left Pane

When clicked, the **DEVICE GROUPS** tab opens on a tree structure:



Refer to the Device Management Module *(see OptiM2M Portal, Operation Module - Device Management, User Manual)* for a full description of the three browsers.

It also includes a **New** button for creating a device group.

Device Group Main Pane

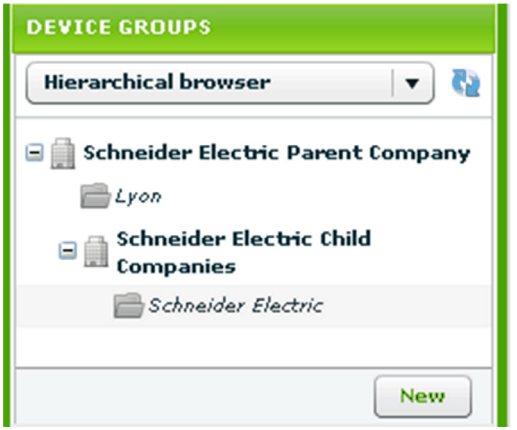
When a device group is selected in the left pane of the **DEVICE GROUPS** tab, the main pane displays a **Device Group Edition** window including all information related to the selected device group. Refer to Creating a device group *(see page 39)* for more information about the device group.

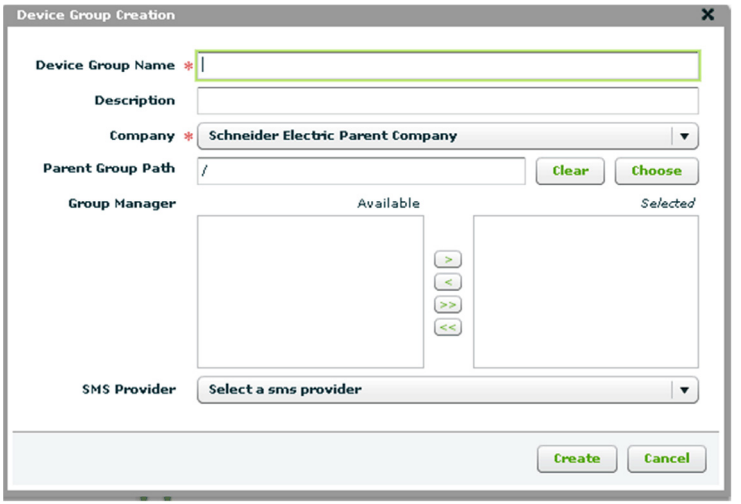
Refer to the table for a list of the command buttons:

Button	Description
Save	Saves the current setting as the setting of the selected device group.
Cancel	Cancels all changes in the setting performed since the last save.
Delete	Deletes the selected device group.

Managing Device Groups

Creating a Device Group

Step	Action
1	In the left pane, click the **DEVICE GROUPS** tab. The tab opens on a tree structure displaying companies administered by the user. By expanding each company, automatically created **DEVICE GROUPS** display:  **NOTE:** Only companies visible by the user are displayed in the **DEVICE GROUPS** tab. Visible companies depend on the user profile and company. If you select a company, the main pane becomes active and displays the device group details, including: • the name of the company automatically associated when creating the company (**Company Name** field). • the user associated with the device group when creating the user (**Group Manager** field).
2	Select the parent device group in the left pane.

Step	Action
3	Click **New**. The **Device Group Creation** window displays:  The **Company** and **Parent Group Path** fields are already populated with the name of the previously selected device group and associated company.
4	Enter a **Device Group Name**. **NOTE:** Only the **Company** and **Device Group Name** parameters are mandatory when creating a device group.
5	Click **Create**. The device group is now created.
6	Repeat the previous procedure to create a new device group. The device groups created display in the left pane.

Editing a Device Group

Once created, device groups is edited in the device group path.

To edit a device group:

- In the device group tree, select the group to modify.
- Change any required values.
- Click **Save**. *(see page 38)*

The following information is modified in this panel:

Tab	Field Description
Device Group Name	The name displayed in the application.
Description	A description for your own use. The portal shows the description for display purposes only.
Company Name	The company to which the device group belongs.
Parent Group Path	Defines the parent device group in the same company.
Group Manager	In the available group managers, the users who are allowed to monitor the device group are displayed and defined in the user edition dialog box. You select the group manager by moving it to the list on the right.
SMS Provider	Selects the SMS provider for the SMS alert sent to the group manager selected.

Administering Asset Groups

5

What Is in This Chapter?

This chapter contains the following topics:

Topic	Page
Asset Group Concept	44
Creating an Asset Group	45

Asset Group Concept

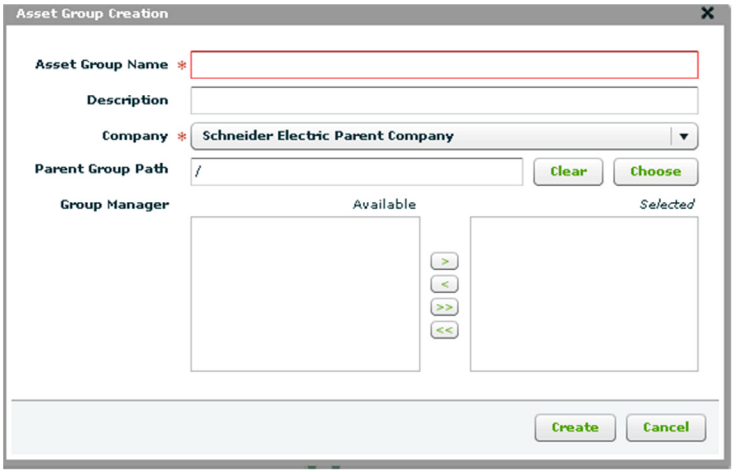
Overview

In the OptiM2M Portal, an asset group is always associated with a company. The asset groups allow the user to organize assets into several groups. A user manages each asset group who has the appropriate rights.

Creating an Asset Group

The following procedure describes how to create an asset group:

Step	Action
1	In the left pane, click the **ASSET GROUPS** tab. **Result:** A tree structure displaying companies administered by the user opens. **NOTE:** Only companies visible by the user are displayed in the **ASSET GROUPS** tab. Visible companies depend on the user profile and company. **NOTE:** If you select a company, the main pane becomes active and displays the asset group details, including: ● The name of the associated company when creating the company. ● The user associated with the asset group when creating the user.
2	To create a child asset group, in the left pane, select the parent asset group.

Step	Action
3	Click **New**. **Result:** An **Asset Group Creation** window opens:  **NOTE:** The **Company** and the **Parent Group Path** fields are already completed with the name of the previously selected asset group and associated company.
4	In the **Asset Group Name**, type an asset group name. **NOTE:** Only the **Company** and **Asset Group Name** parameters are mandatory. All other parameters are optional.
5	Click **Create**. **Result:** The asset group is now created.
6	Repeat the previous procedure to create another asset group.

Administering Models

6

Introduction

Asset and device models define the type of data, commands, and events a device or asset receives from or sends to the portal. Device models also define communication protocols. The **MODELS** tab allows the user to import, export, delete, and search for models.

The OptiM2M Portal uses three types of models:

- **Asset Model**
- **Manufacturer Device Model**
- **Customer Device Model**

These models allow the user to customize the platform behavior according to the devices used and customer requirements.

What Is in This Chapter?

This chapter contains the following topics:

Topic	Page
Manufacturer Device Model	48
Other Models	50
Editing and Managing Your Model	51

Manufacturer Device Model

Overview

A manufacturer device model represents a class of devices with common characteristics. It includes a description of communication and application capabilities for this class of devices. It is used across several companies and not just by child companies of the manufacturer. Schneider Electric defines the manufacturer device models to allow the use of a device class offering.

Communication Capabilities

Communication chains: A communication chain describes how data is transferred between the device and the server. It contains the protocol used (AWT-DA, OMA-DM, and MSCI), the transport (SMS, HTTP), the message serialization properties, and the security properties.

Communication services: A communication service is defined for each kind of message (data, event, command, settings, software/firmware upgrade, configuration). It references the communication chain used to activate the device and the one used to send the message.

Application Capabilities

Data model: Contains a list of variables defined by a name, type, ID, and a unit. Variables are set with read only (`RO`) or read/write (`RW`) permissions.

Usage examples:
- define a variable indicating the battery level
- define a variable to set the device communication frequency

Event model: Contains a list of events defined by an ID, a name, a type, and a description. Events are associated with the following actions: acknowledgement, logging, triggering an alarm when the event is received. Data (a simple string or a variable of the current data model) is also linked to an event.

Usage example: define an event triggered when the battery level is low.

Command model: Contains a list of commands. Each command has an ID and a name. It is defined according to a list of parameter names and types.

Usage example: define a command to restart the device.

Alarm model: Allows you to customize alarm messages mapped to events. It contains a list of alarm definitions with: the alarm type (SMS, E-mail), the events ID, and the message internationalized content.

Operating state: Represents an applicative state of the device. The value of a variable of the current data model setting this state.

Registration mode: Allows the user to add behavior to control the device registration. If this option is added to the model, devices are created only if the device identifier is unknown to the system. There are three possible device identifiers: **IMEI**, **Serial number**, and **MAC Address**.

Other Models

Customer Device Model

A customer device model defines the extension capabilities of a manufacturer model according to customer requirements. It is directly linked to a manufacturer model. It inherits all of its characteristics and refines them either by extending or overriding. The customer device model usually belongs to a specific company and its children.

Asset Model

An asset model represents a class of assets with common characteristics. It includes a description of application capabilities for this class of assets.

Application capabilities include:

- data models
- event models
- command models

They are described in the same manner as in the customer models.

Editing and Managing Your Model

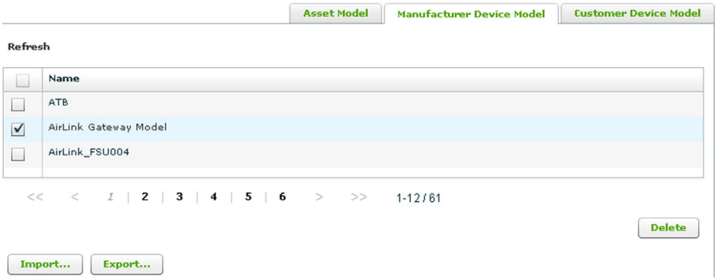
Editing Your Model

Models are created, edited, and then deployed on the OptiM2M Portal using OptiM2M Portal configuration tools *(see OptiM2M Portal, Configuration Module, User Manual)*.

Managing Your Model

The **MODELS** tab allows the user to import, export, and change the visibility of the models. The right menu panel allows the user to display models according to the model name or the owner company.

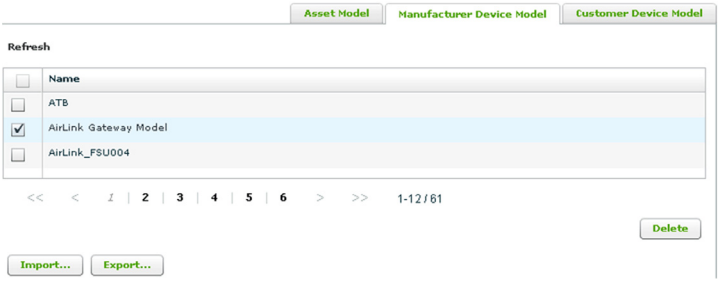
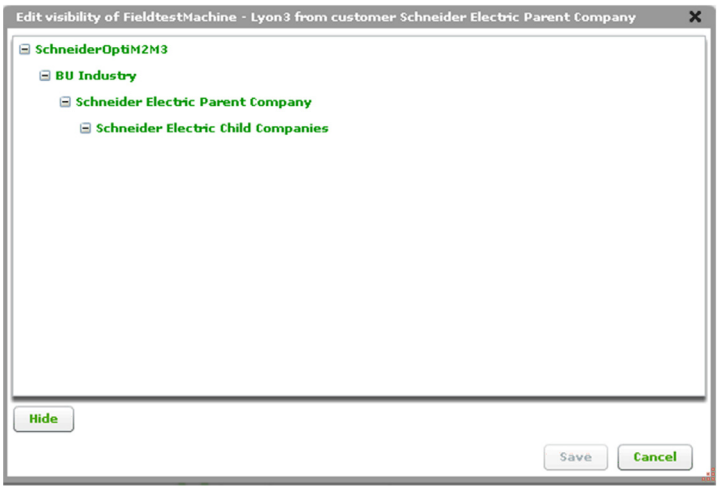
The following procedure describes how to import a model:

Step	Action
1	In the left pane, click **MODELS** tab. **Result:** A search form displays and the **Model Administration** pane is displayed in the main pane.  **NOTE:** Three tabs are displayed: **Asset Model**, **Manufacturer Device Model**, and **Customer Device Model**. Each tab lists all models imported in the portal.
2	In the main pane, click **Import**. **Result:** A file browser displays.
3	Browse to the folder where the model is stored.
4	Select the model.
5	Click **OK**. **Result:** The asset model displays in the table.
6	To import manufacturer or customer device model in the main pane, click the **Manufacturer Device Model** tab or the **Customer Device Model** tab respectively. Repeat the procedure from step 2 to step 5.

Editing the Visibility

By default, the root company models are visible for all the children companies. The user hides the models for each company in the **Company** sub tree.

The following procedure describes how to edit the visibility of a model:

Step	Action
1	In the left pane, click **MODELS** tab. **Result:** A search form displays and the **Model Administration** pane is displayed in the main pane.  **NOTE:** Three tabs are displayed: **Asset Model**, **Manufacturer Device Model**, and **Customer Device Model**. Each tab lists all models imported in the portal.
2	In the main pane, click the model name. **Result:** The **Edit Visibility of FieldtestMachine** window displays. 
3	Browse the tree and select the company which requires to be modified.
4	To hide the model, click **Hide**. To make the model available for this company, click **Show**.
5	Click **Save**.

Administering Activity Logging

7

What Is in This Chapter?

This chapter contains the following topics:

Topic	Page
Activity Logging Concept	54
Activity Logging Tab Interface	57
Searching for Activity Logging Records	60

Activity Logging Concept

Concept Overview

An activity logging is a chronological sequence of activity records which shows user access and operations performed on the OptiM2M Portal during a given period. Activity records are displayed as a table in the main pane when the **ACTIVITY LOGGING** tab is selected.

Audio Record Types

The table describes all types of activity records generated by the OptiM2M Portal:

Activity Record	Module of Origin	Tab of Origin	Command of Origin
Assign Configuration Job Created	device management	devices	When configuring a monitoring setting (**Assign Settings** button, or **Monitoring Configure** command).
Command Job Created	device management asset management		When sending a command (**Command** button).
Data Writing Job Created			When sending a data writing command (In the **Data Writing** tab, **Command** button).
Device Upgrade Job Created	device management		When upgrading a device (**Upgrade** button).
Device Activated			When activating a device (In the **Device Edit** window, **State** box).
Device Created			When creating a device (**New Device** button).
Device Deactivated			When deactivating a device (In the **Device Edit** window, **State** box).
Device marked as Deleted			When deleting a device (**Delete** button).
Device marked as Undeleted			When undeleting a device (**Undelete** button).
Device Unsubscribed	subscriber management		When unsubscribing a device (In the **Device Edit** window, **State** box).
Device Updated	device management		When updating a device (**Upgrade** button).
Get Configuration Job Created			When setting an **On-Demand** monitoring setting of Get type (**Monitoring Configure** command).

Activity Record	Module of Origin	Tab of Origin	Command of Origin
Group Created	administration	device groups asset groups	When creating a device or asset group (**New** command).
Group Deleted			When deleting a device or asset group (**Delete** command).
Group Updated			When updating a device or asset group (In the **Group Edition**, **Save** command).
Login	–	–	When logging in to the OptiM2M Portal.
Logout			When logging out off the OptiM2M Portal.
Profile Assignment Job Created	device management	devices	When assigning a profile to the device (**Assign Settings** command).
User Created	administration	users	When creating a user (**New** command).
User Deleted			When deleting a user (**Delete** command).
User Updated			When updating a user (In the **User Edition**, **Update** command).

Activity Logging Tab Interface

Activity Logging Tab Left Pane

Clicking the **ACTIVITY LOGGING** tab opens a search form:

This search form allows the user to search for an activity record based on a number of search criteria:

- **User**
- **Company**
- **Action**
- **Description**
- **From / To**: activity record time

The user searches using one or several of the search criteria. The **Search** and **Reset** buttons allow the user to start the search *(see page 60)* or clear the form fields, respectively.

Activity Logging Tab Main Pane

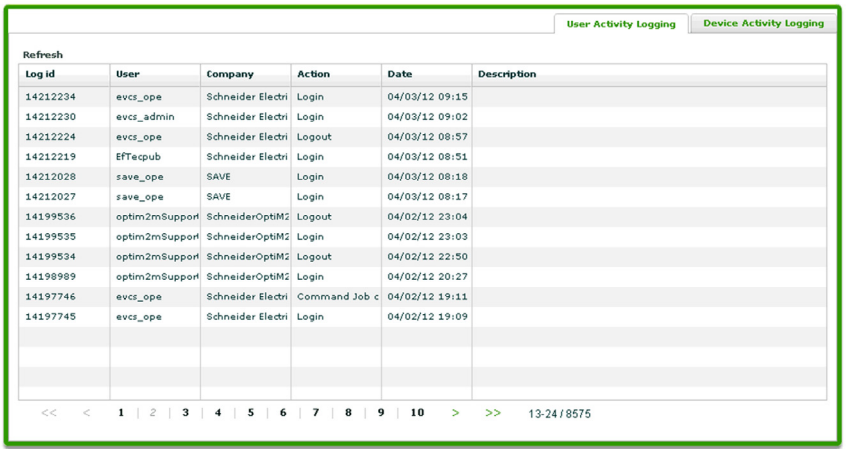
When the **ACTIVITY LOGGING** tab is selected, the **Activity Logging Administration** pane is displayed in the main pane.

NOTE: The user views only available activity records depending on their user profile.

The table describes the information displayed in the main pane:

Column Name	Description
Log id	Activity record identifier.
User	User who has performed the action.
Company	Name of the company associated with the user.
Action	Activity record type *(see page 55)*.
Date	Action date and time.
Description	Additional action-specific information. For example, if a Device updated action is logged, the **Description** column **id** indicates the device unique ID. If a User updated action is logged, the user name displays in the column.

The figure shows a view of the **Activity Logging Administration** pane:


User Activity Logging
Device Activity Logging
Refresh
Log id
User
Company
Action
Date
Description
14212234 evcs_ope Schneider Electri Login 04/03/12 09:15
14212230 evcs_admin Schneider Electri Login 04/03/12 09:02
14212224 evcs_ope Schneider Electri Logout 04/03/12 08:57
14212219 EfTecpub Schneider Electri Login 04/03/12 08:51
14212028 save_ope SAVE Login 04/03/12 08:18
14212027 save_ope SAVE Login 04/03/12 08:17
14199536 optim2mSupport SchneiderOptiM2 Logout 04/02/12 23:04
14199535 optim2mSupport SchneiderOptiM2 Login 04/02/12 23:03
14199534 optim2mSupport SchneiderOptiM2 Logout 04/02/12 22:50
14198989 optim2mSupport SchneiderOptiM2 Login 04/02/12 20:27
14197746 evcs_ope Schneider Electri Command Job c 04/02/12 19:11
14197745 evcs_ope Schneider Electri Login 04/02/12 19:09
<< < 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 > >> 13-24 / 8575

NOTE: The displayed actions depend on the profile and settings of the logged in user.

The **Activity Logging Administration** pane also includes a **Refresh** button to refresh the display and a navigation bar to access the different pages.

Use:

- < and > arrows to display the previous or following activity records pages
- << and >> arrows to display the first or last activity records pages

Searching for Activity Logging Records

If necessary, an activity logging record is searched for directly from the **ACTIVITY LOGGING** tab, using the search form and **Search** button.

NOTE: If no search criterion is set, all activity logging records are displayed. The user can set one or several search criteria before starting the search.

The following procedure describes how to search for an activity logging record:

Step	Action
1	Set as many search criteria as required. **NOTE:** One or several actions are selected in the **Action** list by keeping either the **Ctrl** or **Shift** key pressed.
2	Click **Search** to start the search or click **Reset** to clear the search criteria. **Result:** Search results are displayed in the **Activity Logging Administration** table in the main pane.

Billing Module

8

Overview

This chapter explains the concepts to understand the billing organization and how the billing processes to produce invoices.

What Is in This Chapter?

This chapter contains the following topics:

Topic	Page
Billing Concept	62
Managing Your Invoices	64

Billing Concept

Billing Overview

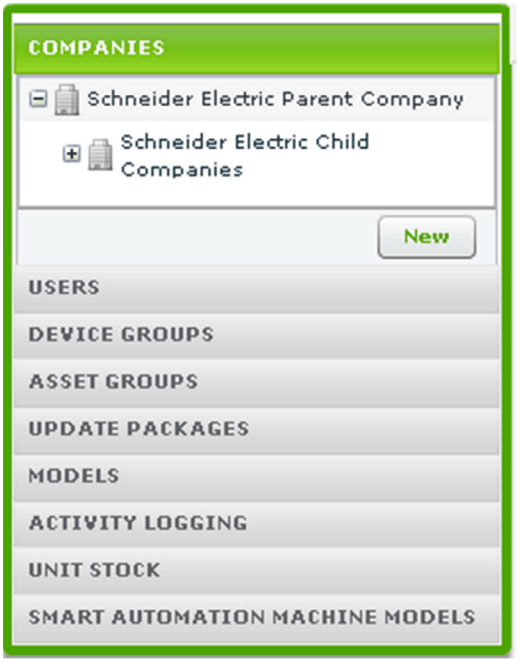
This section presents the billing concepts and definitions to understand the billing features in the OptiM2M Portal.

The billing consists of charging the usage of assets and devices on the OptiM2M Portal and generating invoices for any billable company from a billing company.

A billing company is a company which sells services to their customers.

A billable company is a company which pays the services to its supplier. A billable company has one option available to link with their devices.

The billing company needs specific information to manage the billing for one billable company (billing address, account number, etc.).



Billing company: Schneider Electric Parent Company
Billable company: Schneider Electric Child Companies

Billing Process

Once a billable company is created, all the devices or assets in this company are billed according to their attached offer.

The user who creates a billed device must move the device in the billable company and associates it with an offer (linked with the Schneider Electric subscription). This process is automatically managed by the device registration step.

At the end of the period, the computation process is launched and the invoices are available after three days. The consumption from all the devices is computed. The device billed period begins when the device is registered (or activated) and put in the billable company until the end of billing period. That is, if the device is disabled before the end of the billing period, the billed period stops at the end of the billing period.

NOTE: The billing companies and billable companies are created by the Schneider Electric teams.

Managing Your Invoices

Introduction

The invoices are generated at the end of the billing period after a period of three days. The invoice process of generation can be adapted for each billing company.

Invoice Format

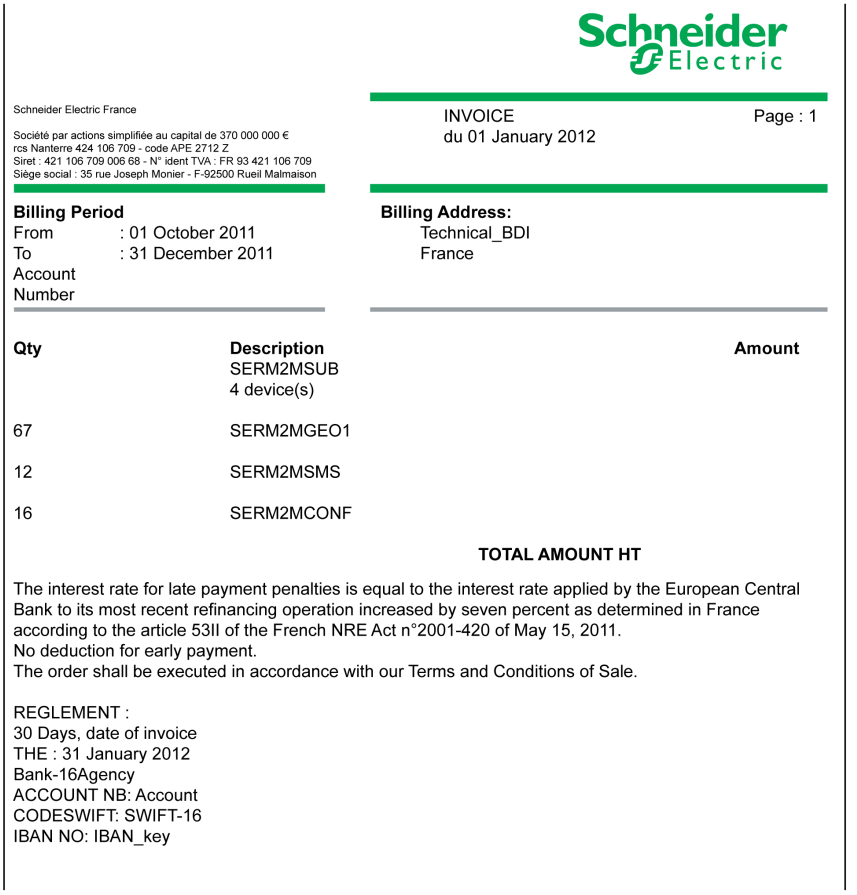
All the invoices contain the same information.

An invoice contains the following sections:

- the billing address of the billable company
- the bank reference of the billable company
- the date and the billing period
- the invoice number - (This number is increased for each billing company.)
- the currency
- the summary of the consumed references
- the terms of payment and the legal terms
- the brand address
  - the fleet consumption
  - the machine consumptions

Invoice Access

The invoices will be sent to each customer by Schneider Electric local.



Schneider Electric

Schneider Electric France

Société par actions simplifiée au capital de 370 000 000 €
rcs Nanterre 424 106 709 - code APE 2712 Z
Siret : 421 106 709 006 68 - N° ident TVA : FR 93 421 106 709
Siège social : 35 rue Joseph Monier - F-92500 Rueil Malmaison

INVOICE
du 01 January 2012

Page : 1

Billing Period
From : 01 October 2011
To : 31 December 2011
Account Number

Billing Address:
Technical_BDI
France

Qty	Description	Amount
	SERM2MSUB 4 device(s)	
67	SERM2MGEO1	
12	SERM2MSMS	
16	SERM2MCONF	

TOTAL AMOUNT HT

The interest rate for late payment penalties is equal to the interest rate applied by the European Central Bank to its most recent refinancing operation increased by seven percent as determined in France according to the article 53II of the French NRE Act n°2001-420 of May 15, 2011.
No deduction for early payment.
The order shall be executed in accordance with our Terms and Conditions of Sale.

REGLEMENT :
30 Days, date of invoice
THE : 31 January 2012
Bank-16Agency
ACCOUNT NB: Account
CODESWIFT: SWIFT-16
IBAN NO: IBAN_key

Schneider Electric

Schneider Electric France

Société par actions simplifiée au capital de 370 000 000 €
rcs Nanterre 424 106 709 - code APE 2712 Z
Siret : 421 106 709 006 68 - N° ident TVA : FR 93 421 106 709
Siège social : 35 rue Joseph Monier - F-92500 Rueil Malmaison

INVOICE
du 01 January 2012

Page : 2

DETAILS

Qty	Description	Amount
DEVICE (IMEI= 359913020000403, activation date = 18/10/2011)		
	SERM2MSUB	
10	SERM2MCONF	
34	SERM2MGEO1	
2	SERM2MSMS	
	SUB TOTAL HT	
DEVICE (IMEI= 359913020000486, activation date = 17/11/2011)		
	SERM2MSUB	
1	SERM2MCONF	
1	SERM2MSMS	
	SUB TOTAL HT	
DEVICE (IMEI= 359913020000213, activation date = 12/12/2011)		
	SERM2MSUB	
4	SERM2MCONF	
33	SERM2MGEO1	
9	SERM2MSMS	
	SUB TOTAL HT	
DEVICE (IMEI= 359913020000270,activation date = 16/12/2011)		
	SERM2MSUB	
1	SERM2MCONF	
	SUB TOTAL HT	

Appendices

Appendix

A

What Is in This Chapter?

This chapter contains the following topics:

Topic	Page
OptiM2M User Profiles and Rights	70
Configure Your Offers	75
Billing Configuration	77

OptiM2M User Profiles and Rights

Schneider Electric User Profiles

Profiles and Rights	Suppliers	Level 3 and Competency Center	Business Unit		P and L	
	Provisioning Operator	Schneider Electric M2M Administrator	Factory Manager	OptiM2M Offer Manager	Schneider Electric Fleet Manager	Schneider Electric Expert
General Access						
Company access	R	R	R	R	R	R
Asset and asset group access	–	R	–	–	R	R
Device and device group access	R	R	R	R	R	R
Administration Application						
Company	–	CRUD	–	–	CRUD	CRUD
User	–	CRUD	–	–	CRUD	CRUD
Device group	–	CRUD	–	–	RUD	CRUD
Asset group	–	CRUD	–	–	RUD	CRUD
Profiles	–	–	–	–	–	–
Update package	–	R/Dis-card/Download	–	–	–	–
Manufacturer device model	R	RD	–	–	–	RD
Customer device model	R	RD	–	–	–	RD
Asset model	–	RD	–	–	–	RD
VIP model	CRUD	CRUD	–	–	CRUD	CRUD
Activity logging - users	–	R	–	–	–	R
Activity logging - devices	–	R	–	–	–	R
Unit stock	R	R	–	–	–	–
Unit stock - imports	C	C	–	–	–	–
Unit stock - exports	–	–	–	–	–	–
Subscriber management configuration	–	–	–	–	–	–

CRUD - Create, Read, Update, and Delete

* Except asset ID

Profiles and Rights	Suppliers	Level 3 and Competency Center	Business Unit		P and L	
	Provisioning Operator	Schneider Electric M2M Administrator	Factory Manager	OptiM2M Offer Manager	Schneider Electric Fleet Manager	Schneider Electric Expert
Billing management - billing offers	–	–	–	CRUD	CRU	–
Billing management - pools	–	–	–	CRUD	–	–
Device Management Application						
Devices (CRUD + undelete + purge)	–	CRUD	–	–	RUD	CRUD + undelete + purge
Settings	–	–	–	–	–	–
OptiM2M registration	–	OK	–	–	–	OK
Commands/Data writing	–	OK	–	–	OK	OK
Upgrade	–	OK	–	–	OK	OK
Events	–	OK	–	–	OK	OK
Data	–	R	–	–	OK	R
Google map	–	R	–	–	OK	R
Imports	CRUD	CRUD	–	–	–	CRUD
Jobs	R	R/Cancel	–	–	R/Cancel	R/Cancel
Asset Management Application						
Assets (CRUD + undelete + purge)	–	CRUD*	–	–	CRUD*	CRUD* + undelete + purge
Commands/Data writing	–	OK	–	–	OK	OK
Events	–	R	–	–	R	R
Data	–	R	–	–	R	R
Google map	–	R	–	–	R	R
Jobs	–	R/Cancel	–	–	R/Cancel	R/Cancel

CRUD - Create, Read, Update, and Delete

* Except asset ID

Profiles and Rights	Suppliers	Level 3 and Competency Center	Business Unit		P and L	
	Provisioning Operator	Schneider Electric M2M Administrator	Factory Manager	OptiM2M Offer Manager	Schneider Electric Fleet Manager	Schneider Electric Expert
Subscription Management Application						
Subaccount	–	CRUD	–	–	–	–
Units	–	CRUD + suspension + destruction + threshold + alarms	–	–	RU + activation + retired + threshold + alarms	–
Operations	–	CRUD	–	–	–	–
Thresholds	–	CRUD	–	–	–	–
Alarms	–	CRUD	–	–	–	–
Imports	–	CRUD	–	–	–	–
Billing Management Application						
Report	–	CRUD	CRUD	R	–	–
Invoice	–	CRUD	–	–	CRUD	–
Asset Management Dashboard						
Asset management dashboard	–	CRUD	–	–	CRUD	CRUD
Registration UI Application						
Registration UI access	–	OK	–	–	–	OK
CRUD - Create, Read, Update, and Delete * Except asset ID						

Customer User Profiles

Profiles and Rights	OEM		Customer	
	Administrator	Operator	Administrator	User
General Access				
Company access	R	R	R	R
Asset and asset group access	R	R	R	R
Device and device group access	R	R	–	–
Administration Application				
Company	CRUD	–	–	–
User	CRUD	–	CRUD	–
Device group	CRUD	–	–	–
Asset group	CRUD	–	–	–
Profiles	–	–	–	–
Update package	–	–	–	–
Manufacturer device model	R	–	–	–
Customer device model	R	–	–	–
Asset model	R	–	–	–
VIP model	CRUD	–	–	–
Activity logging - users	R	–	–	–
Activity logging - devices	R	–	–	–
Unit stock	–	–	–	–
Unit stock - imports	–	–	–	–
Unit stock - exports	–	–	–	–
Subscriber management configuration	–	–	–	–
Billing management - billing offers	–	–	–	–
Billing management - pools	–	–	–	–
Device Management Application				
Devices (CRUD + undelete + purge)	CRUD + undelete + purge	RU	–	–
Settings	–	–	–	–
OptiM2M Registration	OK	–	OK	–
Commands/Data writing	OK	OK	–	–
Upgrade	OK	OK	–	–
CRUD - Create, Read, Update, and Delete * Except asset ID				

Profiles and Rights	OEM		Customer	
	Administrator	**Operator**	**Administrator**	**User**
Events	OK	OK	–	–
Data	OK	OK	–	–
Google map	OK	OK	–	–
Imports	–	–	–	–
Jobs	R/Cancel	R/Cancel	–	–
Asset Management Application				
Assets (CRUD + undelete + purge)	CRUD* + undelete + purge	RU*	RU*	R
Commands/Data writing	OK	OK	OK	OK
Events	OK	OK	R	R
Data	OK	OK	R	R
Google map	OK	OK	R	R
Jobs	R/Cancel	R/Cancel	R/Cancel	R/Cancel
Subscription Management Application				
Subaccount	–	–	–	–
Units	–	–	–	–
Operations	–	–	–	–
Thresholds	–	–	–	–
Alarms	–	–	–	–
Imports	–	–	–	–
Billing Management Application				
Report	–	–	–	–
Invoice	–	–	–	–
Asset Management Dashboard				
Asset management dashboard	CRUD	R	R	R
Registration UI Application				
Registration UI access	OK	–	OK	OK
CRUD - Create, Read, Update, and Delete * Except asset ID				

Configure Your Offers

Introduction

This section describes the OptiM2M's offer structure and the process allowing defining an offer and to create it.

Offer Concepts

To use the OptiM2M, it is necessary to subscribe to the OptiM2M subscription.

This subscription associated to a commercial offer consists of several references.

Each reference is related:
- to a service type (basic subscription, data pack, SMS pack, etc.)
- to a price (price negotiated between the customer and the Schneider Electric local)

Reference	Description
SERM2MSUB	basic subscription: 2500 data / term
SERM2MGE01	additional capacity data pack: 2500 data / month
SERM2MSM	SMS pack: 10 SMS
SERM2MFWUP	updated firmware or software
SERM2MCONF	modem configuration: download the machine model from OptiM2M Portal to device

The billing engine generates an invoice from of device consumptions and of the business offer.

Example: One component of equipment where the consumption is 2300 variables and 16 SMS per month. The customer invoice (where the billing period = quarterly) is:
- three references: **SERM2MSUB** (basic subscription with one data pack)
- six references: **SERM2MSM** (SMS pack - 10 SMS)

Offer Definition

This section describes the process to define a new offer and details the information to supply to Schneider Electric.

After having filled in the offer form with the customer, Schneider Electric local activates the process allowing recording and validating the new offer to the OptiM2M Portal.

Process name: process of creating a business offer. To obtain more information about the process, contact your local Schneider Electric center.

Country Name: .....
P&L name: .....
eMail (P&L name): .....

Customer name: .....
Offer name: .....
Currency (€ or $): .....

Reference	Price	Label
SERM2MSUB	...	Subsciption with 2500 data
SERM2MGEO1	...	Pack of 2500 data
SERM2MSMS	...	Pack of 10 SMS
SERM2MCONF	...	Updated Machine model

Billing Configuration

Overview

This section describes how to configure the billing:

- creating the billing companies
- creating the billable companies

Create billing or billable companies for a root company with the billing feature enabled. If this feature is not enabled, the related tab is not available.

Also a company cannot be changed to a billing or billable company.

NOTE: A billing company creation is managed by Schneider Electric

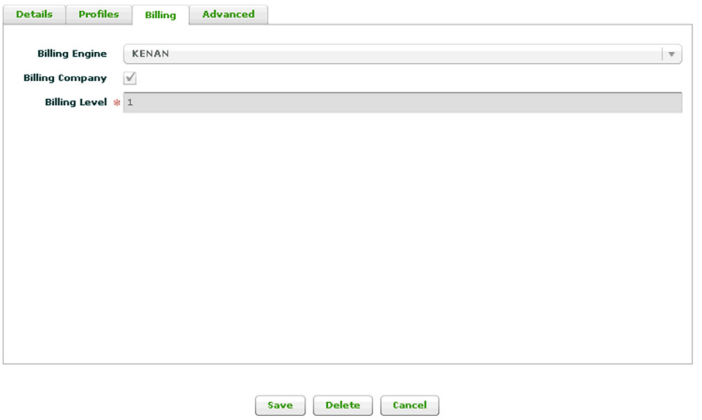
Creating and Editing a Billing Company

Billing company creation, editing, and deletion are managed from the **Company** tab in the **Administration** module as for any other company.

This section describes how to create and edit a billing company.

Billing Company Creation

The following procedure shows how to create a billing company:

Step	Action
1	Click the **Billing** tab: 
2	Define this company as a billing company by checking the **Billing Company** check box.
3	Define the **Billing Level**.
4	Click **Save**.

Billing Company Edition

Once created, specific billing fields for the billing companies cannot be edited further.

The following table describes the fields of the **Billing** tab:

Field	Description
Billing Engine	Specify the billing engine used (for Schneider Electric internal use only).
Billing Company	The check box must be checked.
Billing Level	The level of the billable companies is always 1. **NOTE:** A level 1 means billable companies are direct children of the billing company.

Creating and Editing a Billable Company

Billable company creation, editing, and deletion are managed from the **Company** tab in the **Administration** module as for any other company.

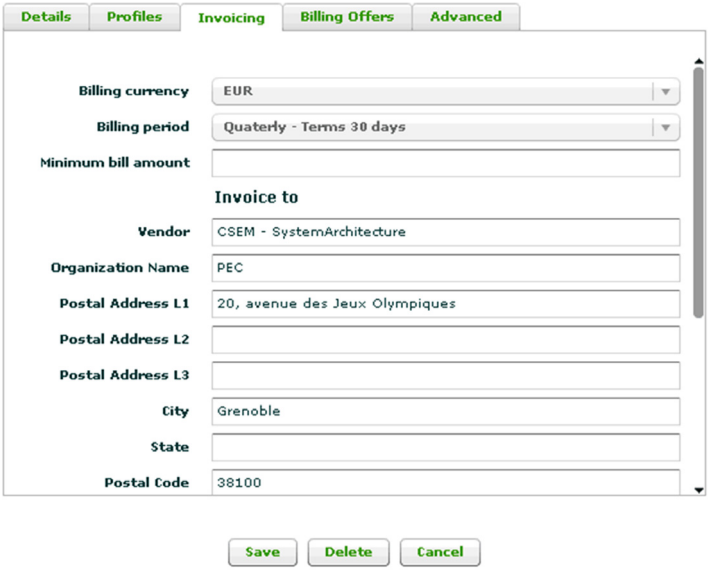
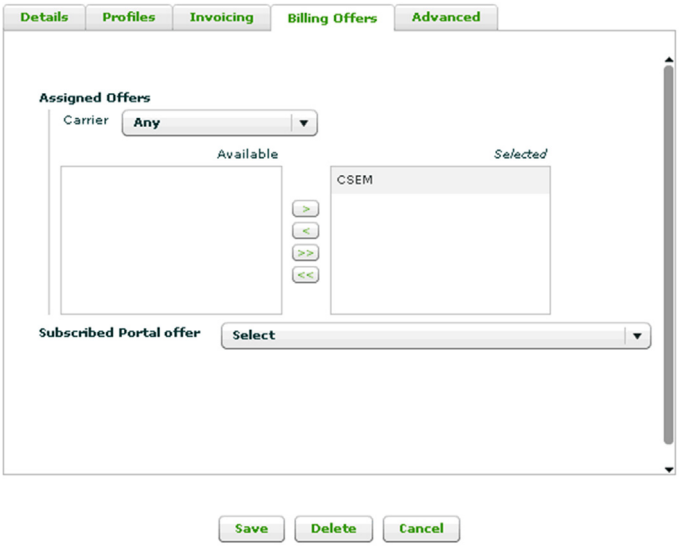
This section describes how to create and edit a billable company. A billable company creation is managed by Schneider Electric.

Billable Company Creation

To create a billable company, create a company in the correct level defined in the parent billing company.

The following procedure shows how to create a billing company:

Step	Action
1	Create a company *(see page 19)*.
2	Click the **Invoicing** tab.

Step	Action
3	Define at least the **Billing currency**, **Billing period** and **Country**. 
4	Click the **Billing Offers** tab. 
5	Select the offers available for this company.
6	Click **Create**.

NOTICE
UNAUTHORIZED DATA ACCESS Before selecting offers, make sure that the chosen company profile and billing period of the company are defined. **Failure to follow these instructions can result in equipment damage.**

Billable Company Edition

Once created, billable companies can be edited in the company using the Administration module as for any other company by clicking the **Company**. The right panel contains the tabs to edit the company.

The following table describes the fields of the **Invoicing** tab:

Field	Description
Billing currency	This currency is used to generate the invoice. Only the euro, US dollar, and Canadian dollar are supported. This field cannot be modified.
Billing period	The period and terms are supported: quarterly - term 30 days. This field cannot be modified.
Vendor	Not used.
Organization Name	
Postal Address L1	This line displays on invoice in the customer address area.
Postal Address L2	
Postal Address L3	
City	The city displays on invoice in the customer address area.
State	The state displays on invoice in the customer address area.
Postal Code	This postal code displays on invoice in the customer address area.
Country	The country displays on invoice in the customer address area. Only France, USA, and Canada are supported.
Division Number	Not used.
Account Number	The account number displays on invoice in the personal area. Not generated on invoice.
Account News	Not used.
Account Comment	

The following table describes the fields of the **Billing Offers** tab:

Field	Description
Assigned Offers	Define the offers available for the devices and assets used by this company.
Subscribed Portal Offer	Subscribes the offer relative to the usage of the operating portal such as API usage.

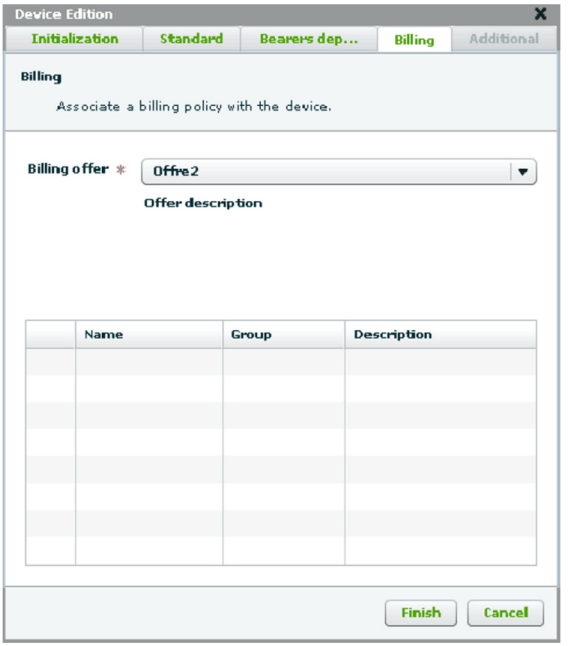
Editing a Billed Device

Billed device editing is managed from the **Device** tab on Device Management module as for any other device.

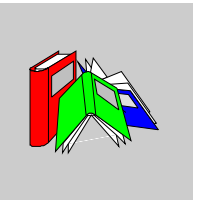
This section describes how to edit a billed device.

Billed Device Edition

The following procedure shows how to create a billed device:

Step	Action
1	Create a device *(see page 39)*.
2	Click the **Billing** tab.
3	Shows the offer related to device. 
4	Click **Finish**.

Glossary



A

AC

alternative current

ACM

accumulated call meter

AT

attention (prefix for modem commands)

B

BTS

base transceiver station

C

CLK

clock

CMOS

complementary metal oxide semiconductor

CS

coding scheme

CTS

clear to send

D

dB

decibel

dBc

decibel relative to the carrier power

dBi

decibel relative to an isotropic radiator

dBm

decibel relative to one milli-watt

DC

direct current

DCD

data carrier detect

DCE

data communication equipment

DCS

digital cellular system

DSR

data set ready

DTE

data terminal equipment

DTMF

dual tone multi-frequency

DTR

data terminal ready

E

E-GSM

extended GSM

EEPROM

electrically erasable programmable read-only memory

EFR

enhanced full rate

EMC

electromagnetic compatibility

EMI

electromagnetic interference

ESD

electrostatic discharges

ETSI

European telecommunications standards institute

F

FIT

series of connectors (micro-FIT)

FR

full rate

FTA

full type approval

G

GCF

global certification forum

GND

protective ground

GPIO

general-purpose input output

GPRS

general packet radio service

GSM

global system for mobile communications

H

HR

half rate

I

I

input

I/O

input / output

IEC

international electrical commission

IMEI

international mobile equipment identification

L

LED

light emitting diode

Little-endian

low-order byte of the number is stored in memory at the lowest address, and the high-order byte at the highest address.

M

MAX

maximum

ME

mobile equipment

MIC

microphone

MICRO FIT

family of connectors from Molex

MIN

minimum

MNP

Microcom networking protocol

MO

mobile originated

MS

mobile station

MT

mobile terminated

N

NOM

nominal

O

O

output

P

Pa

pascal (for speaker sound pressure measurements)

PBCCH

packet broadcast control channel

PC

personal computer

PCL

power control level

PDP

packet data protocol

PIN

personal identity number

PLMN

public land mobile network

PUK

personal unblocking key

R

RF

radio frequency

RFI

radio frequency interference

RI

ring indicator

RMS

root mean square

RTS

request to send

RX

receive

S

SIM

subscriber identification module

SMA

subminiature version A RF connector

SMS

short message service

SNR

signal-to-noise ratio

SPI

serial peripheral interface

SPK

speaker

SPL

sound pressure level

SRAM

static RAM

T

TDMA

time division multiple access

TPC/IP

transmission control protocol / Internet protocol

TU

typical urban fading profile

TUHigh

typical urban, high speed fading profile

TX

transmit

TYP

typical

U

UTC

universal time clock

V

VSWR

voltage stationary wave ratio